



*Better Buildings Residential Network
Peer Exchange Call Series*

*Partnership How-To's – Lessons Learned for Successful Energy
Efficiency Programs*

July 27, 2023

Agenda and Ground Rules

- Moderator
 - **Jonathan Cohen**, Better Buildings Residential Network, DOE Residential Buildings Integration Program (RBI)
- Agenda Review and Ground Rules
- Residential Network Overview and Upcoming Call Schedule
- Opening Poll
- Featured Speakers
 - **Patricia Rothwell**, Energy Efficiency Business Coalition (EEBC)
 - **McKenna Dunbar**, Sierra Club
 - **Bill Graham**, HomeWorks Energy, Inc.
- Open Discussion
- Closing Poll and Announcements

Ground Rules:

1. **Sales of services and commercial messages are not appropriate** during Peer Exchange Calls.
2. Calls are a safe place for discussion; **please do not attribute information to individuals** on the call.

The views expressed by speakers are their own, and do not reflect those of the Dept. of Energy.

Join the Network

Member Benefits:

- Recognition in media, social media and publications
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- One-on-One brainstorming conversations

Commitment:

- Members only need to provide *one number*: their organization's number of residential energy upgrades per year, or equivalent.

Upcoming Calls (2nd & 4th Thursdays):

- *8/10: Wildfires – How Can Residential Energy Efficiency Create a Healthier Indoor Environment*
- *9/14: Heat Pumps – With Unprecedented Incentives, Where Are We Now?*

Peer Exchange Call summaries are posted on the Better Buildings [website](#) a few weeks after the call



Patricia Rothwell
EEBC

Successful Partnership Development



for
**Acceleration of New Programs,
Alignment, and Funding**

Patricia Rothwell
Executive Director
EEBC
patricia@eebco.org
303-319-5623

Successful Partnership Development

3 Case Studies



- **Heat Pump Market Acceleration Project**
Aligning Building Electrification Outreach in CO
- **Denver Electrification Rebates Launch**
Influencing Program Design Improvements from Field
- **IRA/IIJA Funds Rollout**
Influencing Efficient and Effective Distribution of Funds through Collaboration for “Stacking Rebates”

Partnership Strategies

Ideas to Mobilize an Eco-system of Partners



- Engage supply chain in opportunities trending to improve their bottom line – increase HP sales volume/price points
- Provide turnkey resources identified and requested by the utilities, contractors, distributors, and manufacturers
- Facilitate education and resource sharing opportunities between industry and stakeholder groups – tools to convey complex concepts, systemic problems of an eco-systems
- Position as a valuable resource and don't be afraid to ask to get paid for the service!

Complex Eco-Systems Partnership Alignment



1. Buy-in – The first step!
2. Understanding your Audience and Targets
3. Visuals Tools to Align on “Big Concepts”
4. Every Stakeholder Can See themselves in the “Infographic.”
5. Answer “Where Do They Fit Into the Solution?”

HEAT PUMP MARKET ACCELERATION PROJECT

***THIS IS THE MOST EXCITING TIME OUR
INDUSTRY HAS SEEN IN 30 YEARS***
CARMEN BEST, RECURVE

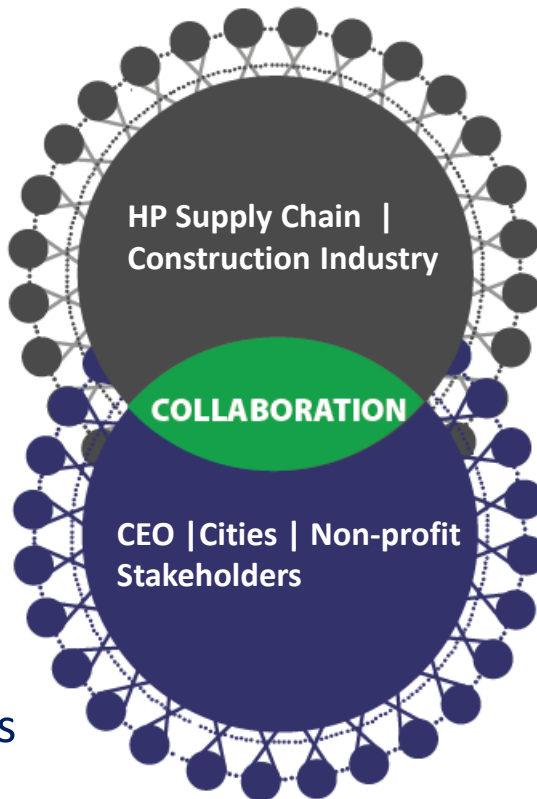


COLORADO
Energy Office

FINAL REPORT | MAY 10, 2021

Call to Action to Meet 2030 Shared Electrification and Decarbonization Goals!

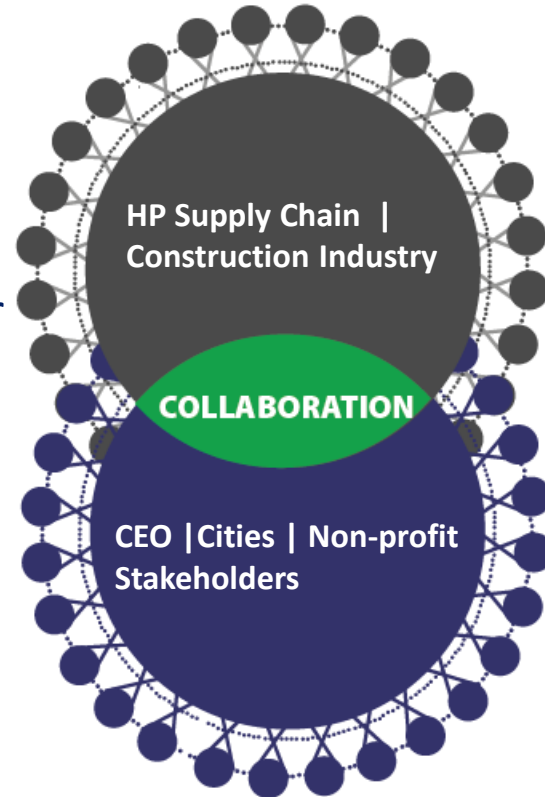
Align HP Supply Chain
and Stakeholders Locally
to Achieve 2030 Milestones



Call to Action

The Next Question is How?

- Shared annual goal setting
- Actionable | Scalable
- What part does your organizations offer?
- Supply Chain | Stakeholder resources available today
- Aligned Funding Needed
 - Internal
 - Local
 - State
 - Federal



Call to Action: Plan Our Efforts Together Align and Share Resources to Accelerate Results!

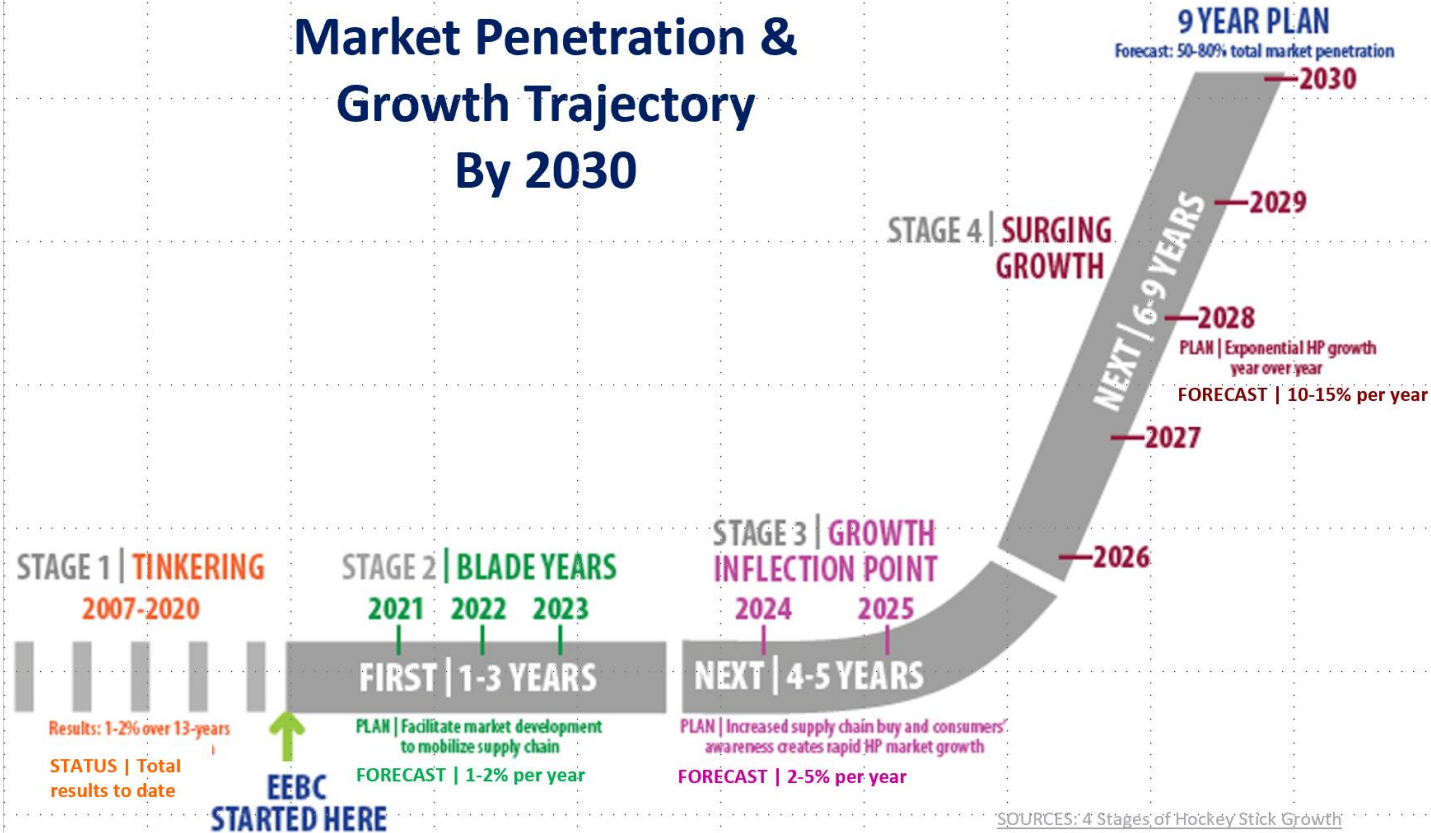


Startups know their first few years will either make or break their business.

Achieving the enviable “hockey stick” growth* that every startup chases is no accident. It takes persistence, planning, and all the right moves.

Colorado's Shared Heat Pump Forecast

Market Penetration & Growth Trajectory By 2030

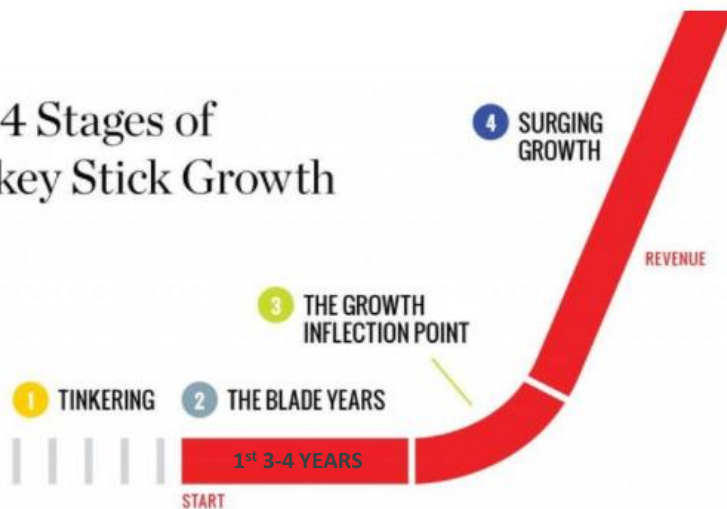


SOURCES: 4 Stages of Hockey Stick Growth
Bobby Marin, Entrepreneur and Author.

The Envable “Hockey Stick” Growth that Every Startup Chases - The Four Crucial Points

Blade years are the most important. This is the time where your startup will either sink or swim.

The 4 Stages of Hockey Stick Growth



1. Tinkering

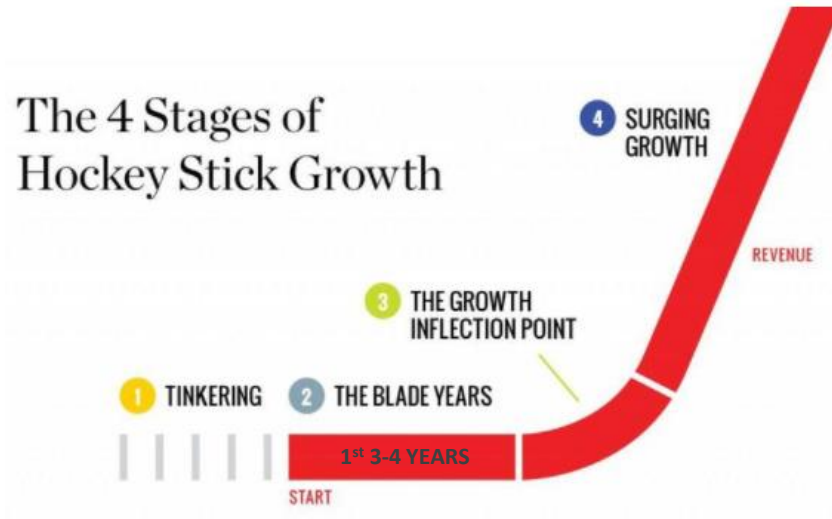
This is where startups look at their business idea more seriously. This phase ends when you take a leap of faith and fully commit to developing the idea into a business.

2. The Blade Years

The first 3 to 4 years of hustling, where you're committing full-time to the startup. You aren't noticing an increase in revenue (if you're making any revenue at all).

The Envable “Hockey Stick” Growth that Every Startup Chases - Four Crucial Points

The 4 Stages of Hockey Stick Growth



3. The growth inflection point

This is where something in your startup “clicks.” Your business model is honed, your revenue jumps, and you’re able to scale your company.

4. Surging growth

The final stage, where your company’s revenue continues to climb and your business starts to scale.

Call to Action

Plan Our Efforts Together, Share Resources, and Get Results!

Why are we talking about “hockey stick” growth?

“Hockey stick” growth is a term used to describe a revenue growth pattern that has been achieved by many successful startups. It typically outlines where the startup begins, their first couple of years hustling, and then a turning point. The turning point is when the company starts to grow and there is no turning back.

Entrepreneur and author [Bobby Martin](#) claims in the first two years of business, most startups record similar revenue streams, no matter if they went on to become huge companies or maintained a moderate revenue stream.

As a start-up, you know your first few years will either make or break your business.

And achieving the enviable “hockey stick” growth is no accident. It takes persistence, planning, and all the right moves.

Inform & Influence: Value of “Supply Chain Feedback Loop”



Denver Launches \$9M Instant Rebate Program for E-Bikes, Heat Pumps and Other Equipment

The Earth Day launch features new incentives to provide up to 100% of the cost for residents and homeowners to take advantage of energy efficient home upgrades and e-bikes

April 22, 2022 10:48 ET| Source: [Denver Office of Climate Action, Sustainability and Resiliency](#)

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IRA/IIJA: “Supply Chain Feedback Loop”

IRA Briefing for EEBCO

December 2022



COLORADO
Energy Office

Thank you

For Questions Contact



Energy Efficiency Business Coalition (EEBC)

Patricia Rothwell

Executive Director

patricia@eebco.org

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Common Thread Solutions

A Strategic Agency Consultant

Patricia Rothwell

President/Owner

Common Thread, LLC

patricia@commonthreadbiz.com

303-319-5623



McKenna Dunbar
Sierra Club



Communicating Energy Efficiency Alongside Community Based Organizations (CBOs)

Navigating the nexus between energy efficiency programming and community engagement

McKenna Dunbar; *Building Electrification Lead at Sierra Club*
mckenna.dunbar@sierraclub.org

Environmental Justice Framework

Representative



Procedural



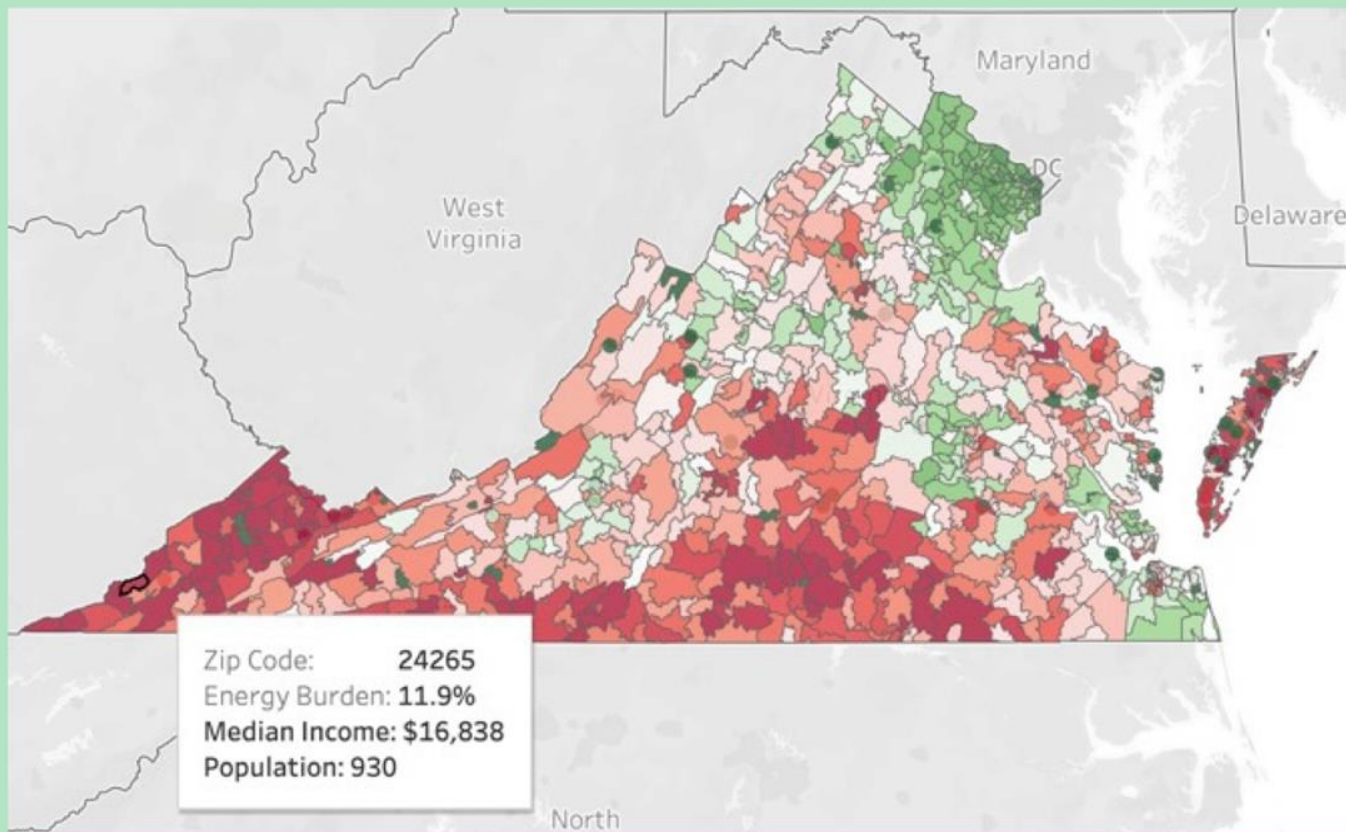
Distributive

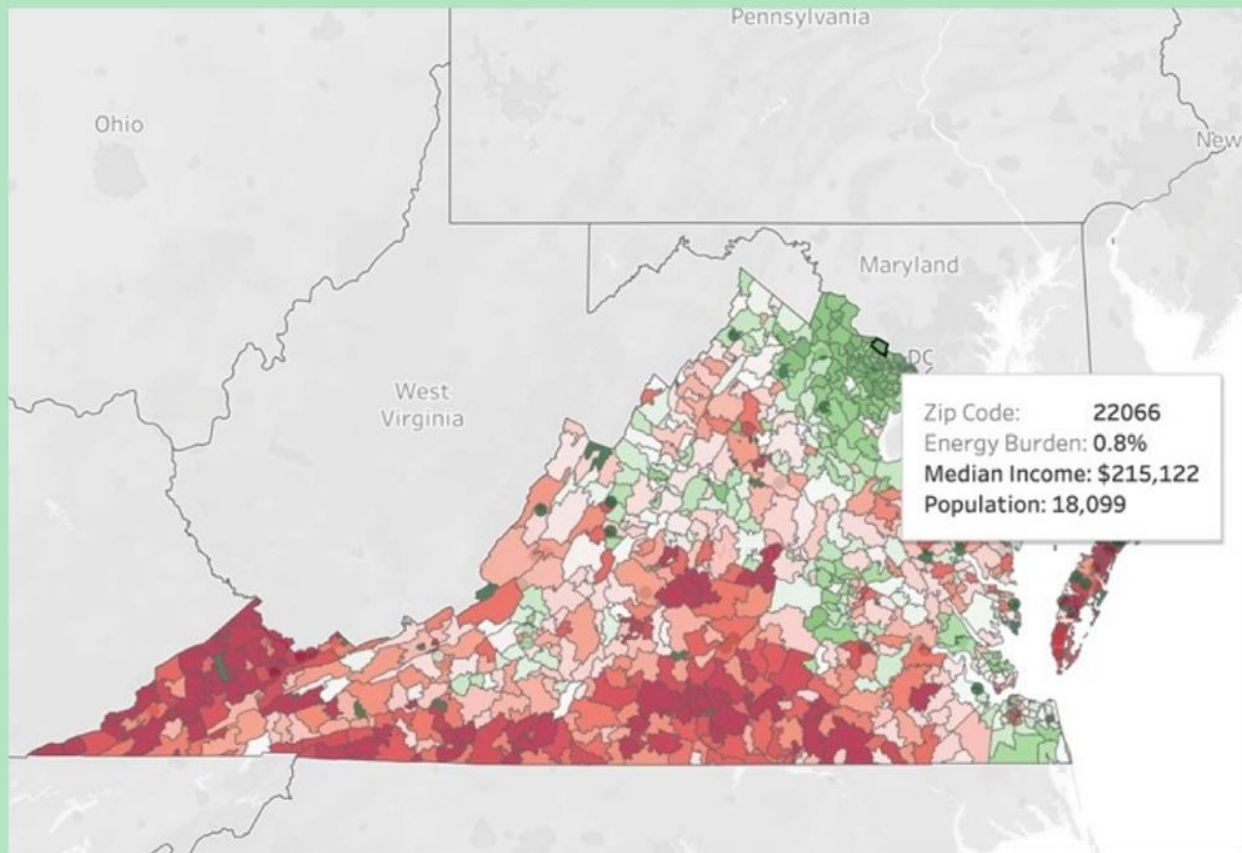
Consider not abbreviating the phrase
"Environmental Justice" when engaging
in comms/marketing work.

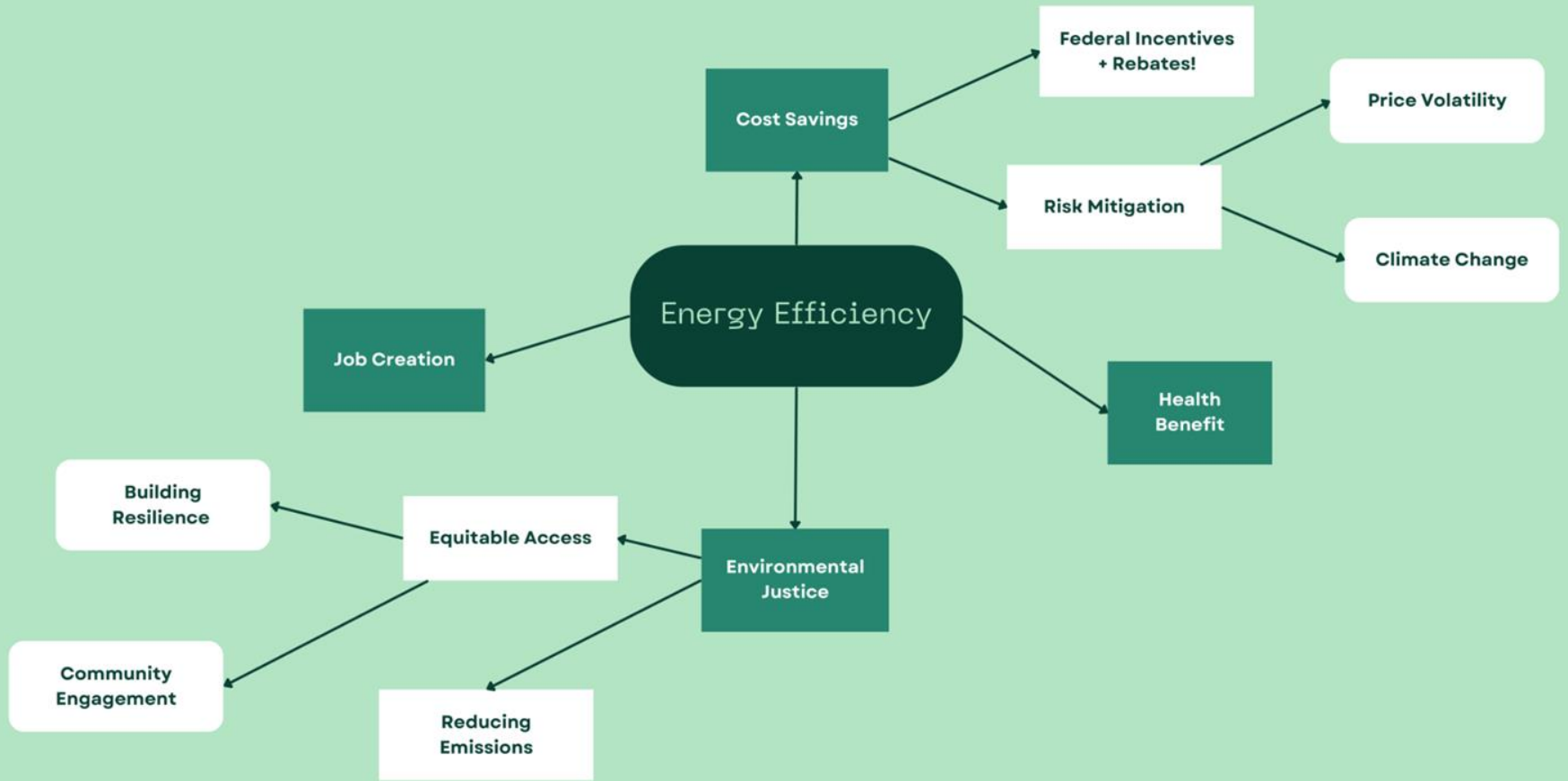
Why?

1. Clarity + Comprehension
2. Respect + Recognition
3. Maintaining Impact
4. Upholding the Cause

Electricity Burden in Virginia, ZIP Code by ZIP Code; The Affordable Clean Energy Project (ACEP) of Virginia Poverty Law Center







4 Pillars

The democratization of information	The active and meaningful engagement of community members	The targeted inclusion of underrepresented populations	The equitable availability of resources
<p>Transforming the labyrinth of energy efficiency knowledge into accessible wisdom, we must empower communities to harness the potential of informed decision-making.</p>	<p>By cultivating deep roots of community involvement, we must foster a sense of ownership and commitment, seeding the growth of sustainable, energy-efficient practices.</p>	<p>Embracing those on the margins, we must mitigate historical oversights, weaving a tapestry of energy equity that intertwines every thread of our diverse communities.</p>	<p>We rise above mere equality to embrace equity, acknowledging diverse community needs to navigate the unique challenges in the quest for energy efficiency.</p>

So...what does this actually look like?



Pillar 1

Our joint training sessions with BTGVA demystify complex energy concepts, empowering participants to wield the power of informed decision-making.



Pillar 2

Our partnership with C5 is characterized by community-led planning of our quarterly summits, fostering active participation and ownership over local energy efficiency initiatives.



Pillar 3

Working with BTGVA, we tap into the potential of underrepresented groups, offering green energy training and opportunities to those traditionally overlooked, fostering an inclusive energy future.



Pillar 4

Through BEEM, we provide tailored support and comprehensive explanation of weatherization services available to lower-income households, ensuring resources meet the diverse needs of the communities that our stakeholders engage in.

Raye Elliott

Flipp Inc



Richard Walker

Bridging the Gap in Virginia



La'Veesha Rollins

Concerned Citizens of Charles City County



Thank you!

Email

mckenna.dunbar@sierraclub.org

Linkedin

<https://www.linkedin.com/in/electrification/>



Bill Graham
HomeWorks Energy, Inc.



HomeWorks
Energy

Partnership How To's – Lessons Learned for Successful Energy Efficiency Programs

Municipal Power & Enlightenment

Bill Graham, CMO

HomeWorks Energy Background

- Founded in 2008, now six regional offices across MA, with more than 500 employees
 - Largest HPC and Mass Save partner in the state
- Connecticut operation with 40 employees
- As an independent Home Performance Contractor, we drive all our own business
 - Mid-seven-figure marketing budget
 - Metrics-driven – CPS, CPP, Lifetime Value
 - Home Energy Assessment is entry point for follow-up work: Weatherization; HVAC; Maintenance contracts; Windows & Solar (via partnership)

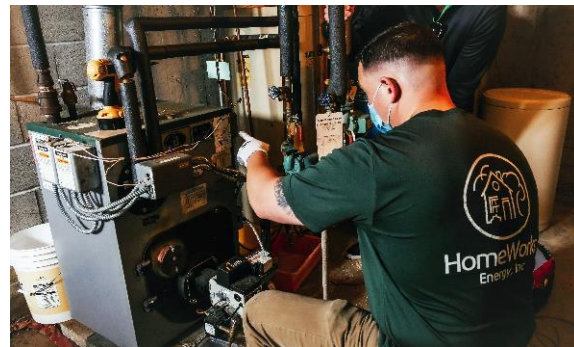


What We Do

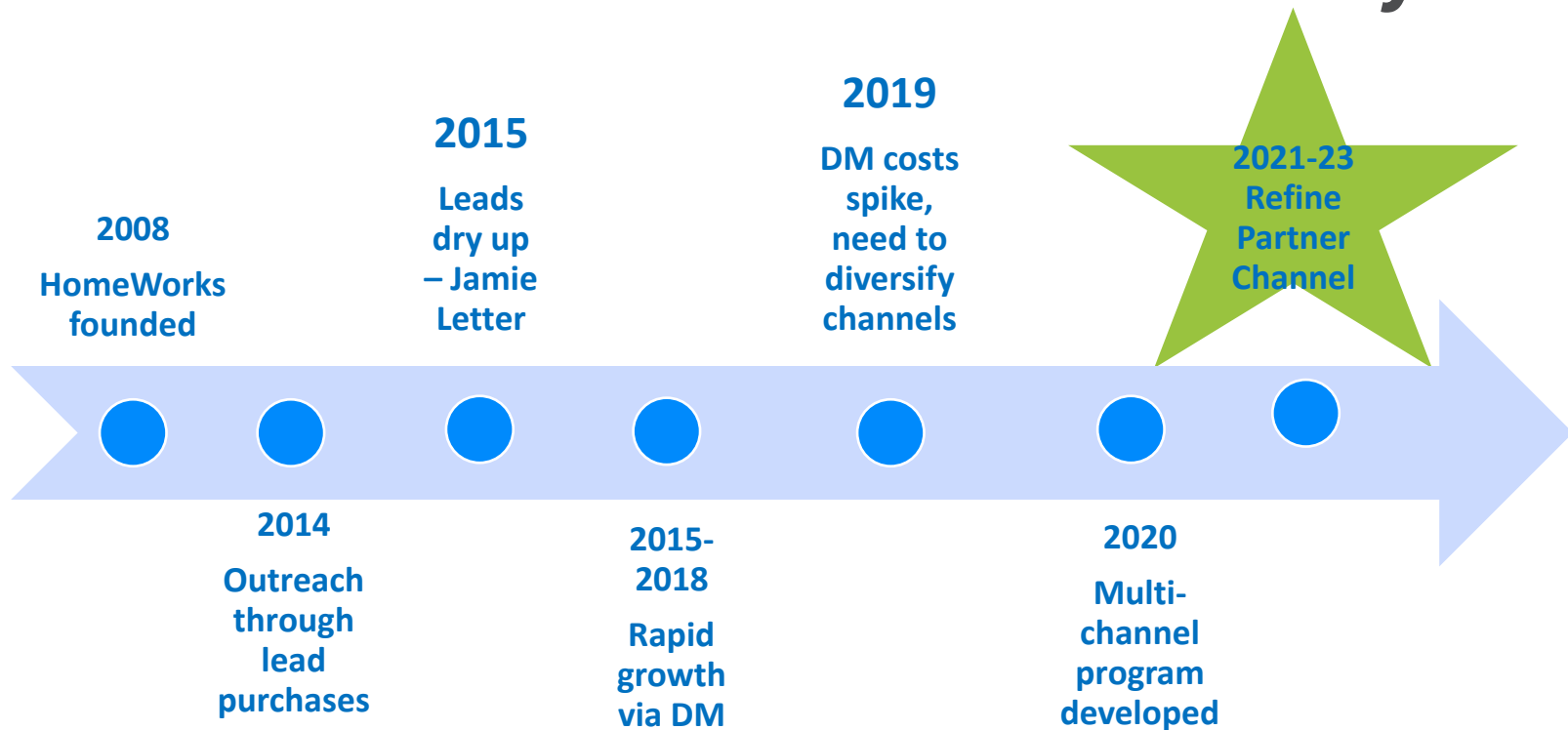
**Home Energy
Assessments
32,000**

**Weatherization /
Insulation
12,000**

**HVAC /
Heat Pumps
1,500 ASHP**



Outreach at HomeWorks – A brief history



Evolution of Marketing at HomeWorks

2015 - 2019

Hi <First Name>.

I am actually going to be right by <Street Name> next week to give a few of your neighbors a home energy assessment. I will be testing their home to see how energy efficient it is and will provide recommendations to help them save money on their utility bills - all paid for by the Mass Save® Home Energy Services Program. Since we are doing several assessments around your neighborhood, I thought I would reach out while we'll be in the area.

My company, HomeWorks Energy, provides the Mass Save program incentives to our customers, which allows us to offer generous rebates on our work and various no-cost extras including the assessment. The assessment will take between 2-3 hours, during which we will check your insulation levels and heating system efficiency. Plus we will install LED light bulbs and programmable thermostats at no cost to ensure your home is as efficient as possible. All of this is covered 100% by National Grid and Eversource under the Mass Save program.


At the end we will give you a report with any energy efficiency recommendations we find so you can decide if you'd like to move forward with any insulation work. We will also be looking to see if you can take advantage of great rebates up to \$2,750 to upgrade your heating system or install air conditioning.

These are definitely amazing incentives, but in reality you have already been paying into this energy efficiency program. Each customer of a Mass Save sponsoring utility pays a small amount each month to fund the rebates and incentives offered through the program.

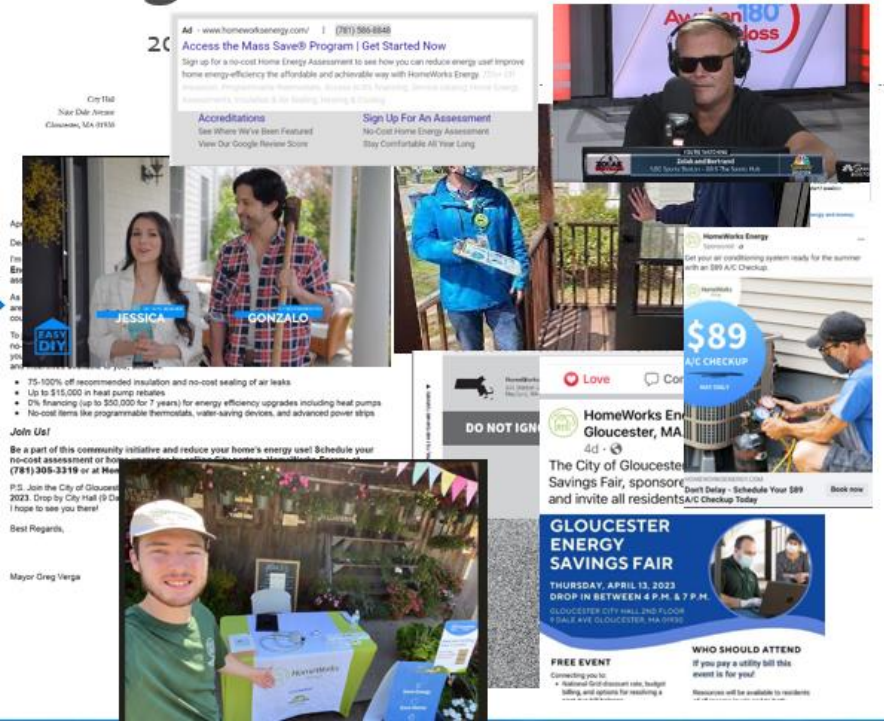
So please give me a call today at (781) 305-3319. I look forward to hearing from you!

www.homeworksenergy.com/jamie

Regards,



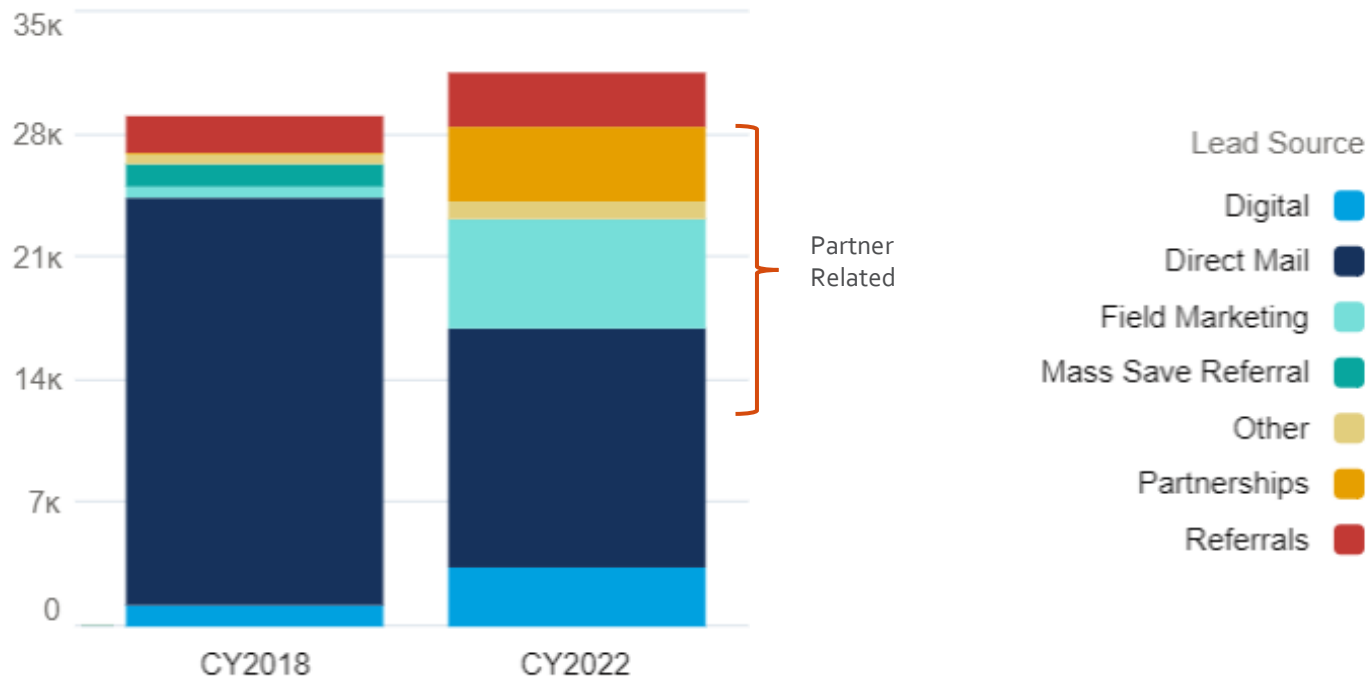
Jamie Davis
BPI Certified Home Energy Specialist
(781) 305-3319
jamie.davis@homeworksenergy.com
www.homeworksenergy.com



The collage illustrates the evolution of HomeWorks Energy's marketing in 2019. It includes a direct mail piece for the Mass Save program with a '20%' discount offer, a radio broadcast on Aviston 180, a Facebook post for an A/C checkup, a flyer for a Gloucester Savings Fair, and a photo of a staff member at an outdoor event.



Channel Mix Over Time



Partnership Testing

- Beginning in 2020 (post COVID) tested a number of partnership channels
 - Local businesses – restaurants, hardware stores
 - Local non-profits
 - Corporate / HR employee benefits
 - Real estate companies / lists
- Developed several town partnerships ... but it was slow going




Hungry for savings? Get a no-cost virtual home energy assessment and HomeWorks Energy will give you a \$50 gift card to Abbott's Food Custard in Needham!



Homeowners, reap the benefits of a virtual home energy assessment with eligible no-cost LED bulbs, energy power strips and energy-saving shower heads right to your door.

Save energy, save money, save the planet ... and save for dessert!

Schedule your virtual home energy assessment to HomeWorks.works/abbotts



WANT TO BE GREENER?

Find out how to reduce your household's energy costs and your carbon footprint!


Join the Congregational Church of Needham and HomeWorks Energy for an educational presentation about home energy efficiency:

Sunday, April 23, 2023
11:30 AM - 12:30 PM
Congregational Church of Needham
1154 Great Plain Ave


Get a no-cost Home Energy Assessment and access Mass Save® rebates like:

- 75-100% off recommended insulation and no-cost sealing of air leaks
- Up to \$16,000 in heat pump rebates
- 0% financing for heating and cooling equipment, insulation, the removal of knob and tube wiring, and more
- No-cost items like programmable thermostats, advanced power strips, and water saving devices

Join this free event!
Hosted by The Environmental Ministry team



HomeWorks Energy



mass save PARTNER

Catalyst for Towns: Community First

- Mass Save sponsored Community First Partnerships (CFP)
- Grants of up to \$60K annually
- Municipalities must commit to 2-year participation
 - Scorecard and goals
 - Training
 - Track progress and report
- In 2022, 30 municipalities chosen
 - Created pressing need for action
 - Legitimized town partnerships

HomeWorks Municipal Partners

- Adams
- Arlington
- Attleboro
- Beverly
- Canton
- Carlisle
- Chelmsford
- Fall River
- Gloucester
- Great Barrington

- Lanesborough
- Lee
- Lexington
- Longmeadow
- Malden
- Melrose
- New Bedford
- North Adams
- Norwood
- Green Needham
- Sustainable
Marblehead

- Pittsfield
- Salem
- Springfield
- Taunton
- Tyngsborough
- West Springfield
- Westborough
- Westport
- Williamstown
- Sustainable
Wellesley

Municipal Channel Marketing

City Hall
New Dale Avenue
Gloucester, MA 01930



PHONE: (781) 261-2100
FAX: (781) 261-8738
mayor@gloucester.ma.gov

CITY OF GLOUCESTER
OFFICE OF THE MAYOR

April 13, 2023

Dear Gloucester Resident,

I'm excited to share the tremendous progress we have made since implementing the Gloucester Energy Challenge. Thanks to hundreds of Gloucester residents, we've performed 447 energy assessments and completed 61 weatherization upgrades.

As a Mass Save® Community First Partner, sponsored by National Grid, we are working to reduce carbon emissions in our neighborhoods and we couldn't do it without the participation of community members like you.

To join the Gloucester Energy Challenge, we invite you to sign up for a no-cost Mass Save Home Energy Assessment. At your assessment you'll learn how you can save energy and access Mass Save rebates and incentives available to you, such as:

- 75-100% off recommended insulation and no-cost sealing of air leaks
- Up to \$15,000 in heat pump rebates
- On financing (up to \$50,000 for 7 years) for energy efficiency upgrades including heat pumps
- No-cost items like programmable thermostats, water-saving devices, and advanced power strips

Join Us!

Be a part of this community initiative and reduce your home's energy use! Schedule your no-cost assessment or bring us a [Mass Save Home Energy Assessment](#) form.

P.S. Join the City of Gloucester Energy Challenge. Drop by City Hall (9 Dale Ave) on Thursday, April 13, 2023. Drop by City Hall (9 Dale Ave) on Thursday, April 13, 2023. I hope to see you there!

Best Regards,

Mayor Greg Varpe



Watch a Home Energy Assessment - Scan the QR code

Love

Comment

Send



HomeWorks Energy is in Gloucester, MA.

4d · 🌐

The City of Gloucester will host an Energy Savings Fair, sponsored by National Grid, and invite all residents drop in b... See more

GLOUCESTER ENERGY SAVINGS FAIR

THURSDAY, APRIL 13, 2023

DROP IN BETWEEN 4 P.M. & 7 P.M.

GLOUCESTER OFF-PAVILION FLOOR

9 DALE AVE GLOUCESTER, MA 01930



FREE EVENT

Connecting you to:

- National Grid account info, budget billing, and options for rescheduling a service visit

WHO SHOULD ATTEND

If you pay a utility bill this event is for you!

Resources will be available to residents

Case Study: The Energy Challenge

- Partnered with two cities undertaking a three-year “Energy Challenge”
- Launched in July 2022 with jointly agreed marketing plan
 - HomeWorks designs and pays for all marketing, with direction and approval from the cities
 - Multilingual capabilities, process for Income Eligible and multi-family
 - Comprehensive reporting to cities
- Marketing and outreach activities include:
 - Press release from cities
 - Letter to residents from mayors
 - Tabling events at local businesses
 - Canvassing, door hangers
 - Digital paid advertising and social media, web landing page with scheduling capability
 - Community learning events / webinars

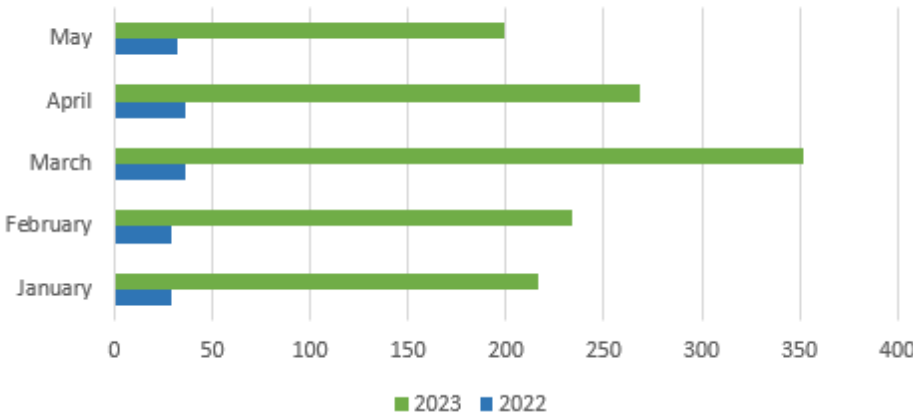
The Energy Challenge - Results

- After three months
 - Performed more than 700 home energy assessments (with another 600 on the schedule)
 - Completed almost 200 weatherization installs
 - Spec'd homes for 45 high efficiency HVAC / heat pump systems
- One year later
 - 1,400 energy assessments
 - 460 weatherization installations
 - 700% increase in program participation

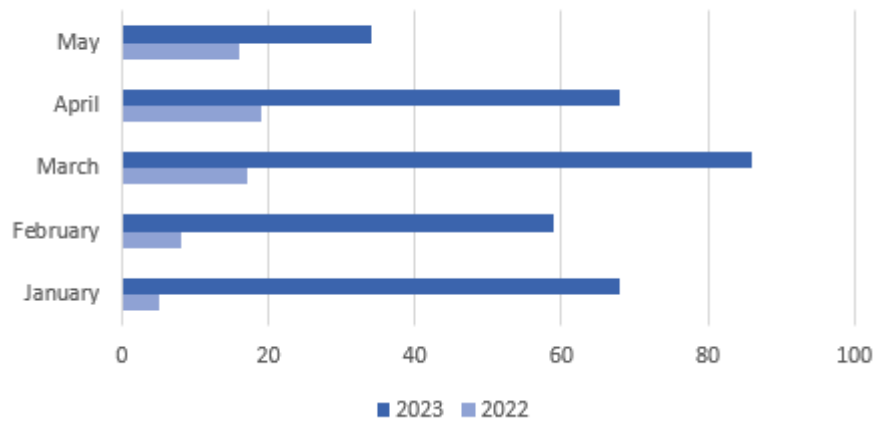
Another Example of Partnership Effectiveness

- Melrose / Malden: Before & After

HEAs 2022 vs. 2023



Weatherization Installs 2022 vs. 2023



Lessons Learned

- Municipal partnerships are an effective catalyst for existing marketing channels and capabilities
 - Provide credibility and promote action
- Coordinated and sustained campaign is important
- Creating a shared “challenge” is motivating
- Need strong advocate within partner towns
- Programmatic design (i.e. CFP) can provide a tipping point for municipalities

Smart Tools for Efficient HVAC Performance (STEP) Campaign



Scan this QR code to visit our website

Contact: christian.valoria@pnnl.gov

The STEP Campaign aims to increase adoption of **smart diagnostic tools** to streamline HVAC system performance testing and troubleshooting, **reducing energy-wasting faults** and **improving occupant comfort**.

To join the STEP Campaign, visit: bit.ly/3DFmEaE



HVAC Contractors and Technicians

- Reduce callbacks, improve consistency and quality, streamline processes
- Find out where to get training on smart diagnostic tools
- Be recognized for successful adoption of smart diagnostic tools!



Utilities and Program Implementers

- Streamline quality installation and quality maintenance programs
- Improve engagement with your contractors
- Be recognized for programs that utilize smart diagnostic tools!



HVAC Training Organizations

- Offer qualified training on System Performance with smart diagnostic tools
- Promote your training events
- Be recognized for providing training!



Weatherization Organizations

- Ensure your ASHP/CAC installations are operating at optimized efficiency
- Develop pilot with PNNL team
- Be recognized!

ORGANIZING PARTNERS

Explore the Residential Program Guide

Resources to help improve your program and reach energy efficiency targets:

- [Handbooks](#) - explain *why* and *how* to implement specific stages of a program.
- [Quick Answers](#) - provide answers and resources for common questions.
- [Proven Practices](#) posts - include lessons learned, examples, and helpful tips from successful programs.
- [Technology Solutions](#) **NEW!** - present resources on advanced technologies, **HVAC & Heat Pump Water Heaters**, including installation guidance, marketing strategies, & potential savings.
- [Health + Home Performance Infographic](#) – spark homeowner conversations.



<https://rpssc.energy.gov>

Health + Home Performance Infographic



DOE's new Health + Home Performance Infographic reveals the link between efficiency and health – something everyone cares about. Efficiency programs and contractors can use the question-and-answer format to discover a homeowner's needs.

The infographic is ideal for the “kitchen table” conversations where people decide what to do – and who they want to do it. It also has links for homeowners to find a qualified contractor if they do not already have one.

[Download](#) this infographic from DOE's Better Buildings Residential Network.

Looking for photos to help tell your energy efficiency story? Visit our image libraries:
<https://www.energy.gov/eere/better-buildings-residential-network/articles/image-libraries>

Thank You!

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Please send any follow-up questions
or future call topic ideas to:
bbresidentialnetwork@ee.doe.gov